Position: Small Business Intake Specialist  
Department: Entrepreneurship Center  
Supervisor: Compliance & Lending Analyst  
Revision Date: February 2022

SUMMARY:
The Small Business Intake Specialist plays a key role in supporting the Entrepreneurship Center to ensure the team meets programmatic goals and outcomes, maintain compliance and actively engage community.

CORE DUTIES AND RESPONSIBILITIES (Abbreviated) include the following:
- Responds to incoming calls and requests and educates callers regarding the service offerings
- Conducts small business intake and assessments
- Determines the best course of action for the entrepreneur, small business.
- Collects client intake forms and ensures all required client and program data is recorded in the client management system Outcome Tracker and Downhome Loan Manager
- Collects and tracks all client participation goals and Return on Investment Data for outcome and reporting purposes
- Assists in the disbursement and collection of industry and funder surveys
- Ensures that data collection, reporting and filing systems meet organization’s reporting needs and complies with all contracts’, funders’, and audit requirements
- Schedules appointments with EC team or TA provider
- Prepares pipeline report of service requests
- Prepares client files (copy required documentation), loan presentation and workshop materials as needed
- Provides current information to program clients, prepares email communications and scheduling of meeting rooms as needed for appointments
- Performs other duties as assigned.

Education and Experience
- Associate's Degree required; Bachelor's Degree preferred in the field of business, customer service, social work, education or related human service field or a combination of college education and four years of job related experience.

Qualifications & Skills
- A minimum of at two years’ experience entering client level data into an electronic database.
- Experience in housing, financial literacy, and/or asset building required
- Strong and clear verbal and written communicator
- Strong knowledge of MS Office, including Excel, Word, and database skills.
- Must have excellent presentation skills.
- Experience in the area of recruitment preferred.
- Resourcefulness and entrepreneurial spirit.
- Familiarity with government programs, philanthropy, legal documentation is a plus.
- Demonstrated ability to establish and maintain systems for organizing work; well-developed time management skills and ability to meet stringent deadlines and time constraints.
- Mature judgement and demonstrated ability to work with minimal supervision in a fast-paced work environment.
- Demonstrated professionalism, diplomacy, and composure; flexible and able to adapt to a variety of situations.
- Ability to work cross-functionally with multiple business departments and in a team environment, including senior management.
- Bilingual preferred in English and Spanish, Creole, etc.
- Experience working with disadvantaged populations.
- Must have a valid Florida driver’s license and reliable transportation.
- Must be able to pass a level two criminal background check and drug screening

Submit Cover Letter and Resume to: hiring@ulbcfl.org

THE URBAN LEAGUE OF BROWARD COUNTY IS AN EQUAL OPPORTUNITY EMPLOYER